Headquarters U.S. Air Force

Integrity - Service - Excellence

Acquisition Support Team Phase III

Jesse Barrera

AF Center for Environmental Excellence

HQ AFCEE/HDP

U.S. AIR FORCE

Introduction

- **Acquisition Support Team (AST) - The AST is a committee chosen by a selection authority to evaluate proposals in the solicitation process and make recommendations to the selection authority. This session will cover the project solicitation, evaluation, and approval activities leading to project award. A chronology of events, tasks, and expectations that an AST will confront as Offerors are preparing their proposals and as the AST develops their rating recommendations will be presented.**

U.S. AIR FORCE

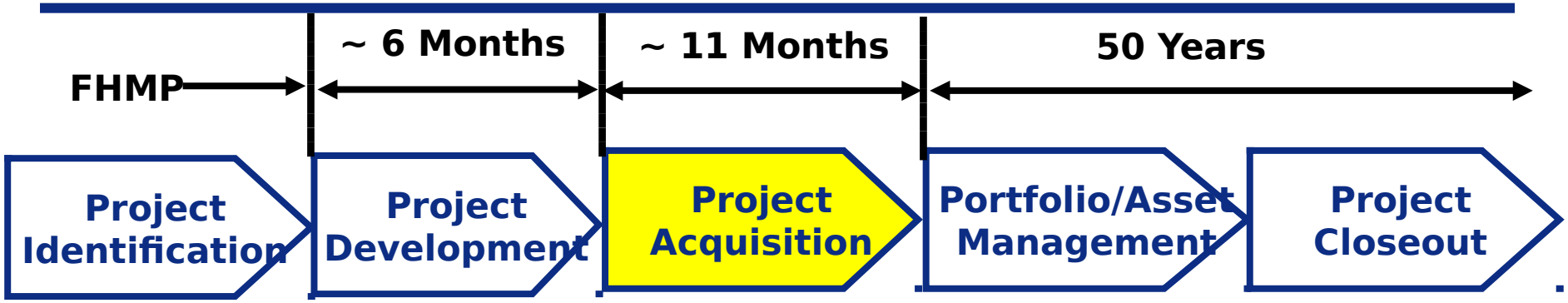
Overview

- Project Life Cycle
- Composition of the AST
- Key Decisions
- AST Activities and Meeting Locations
- Project Solicitation/Evaluation
- Approvals

U.S. AIR FORCE

Project Life Cycle

Housing Privatization Phases

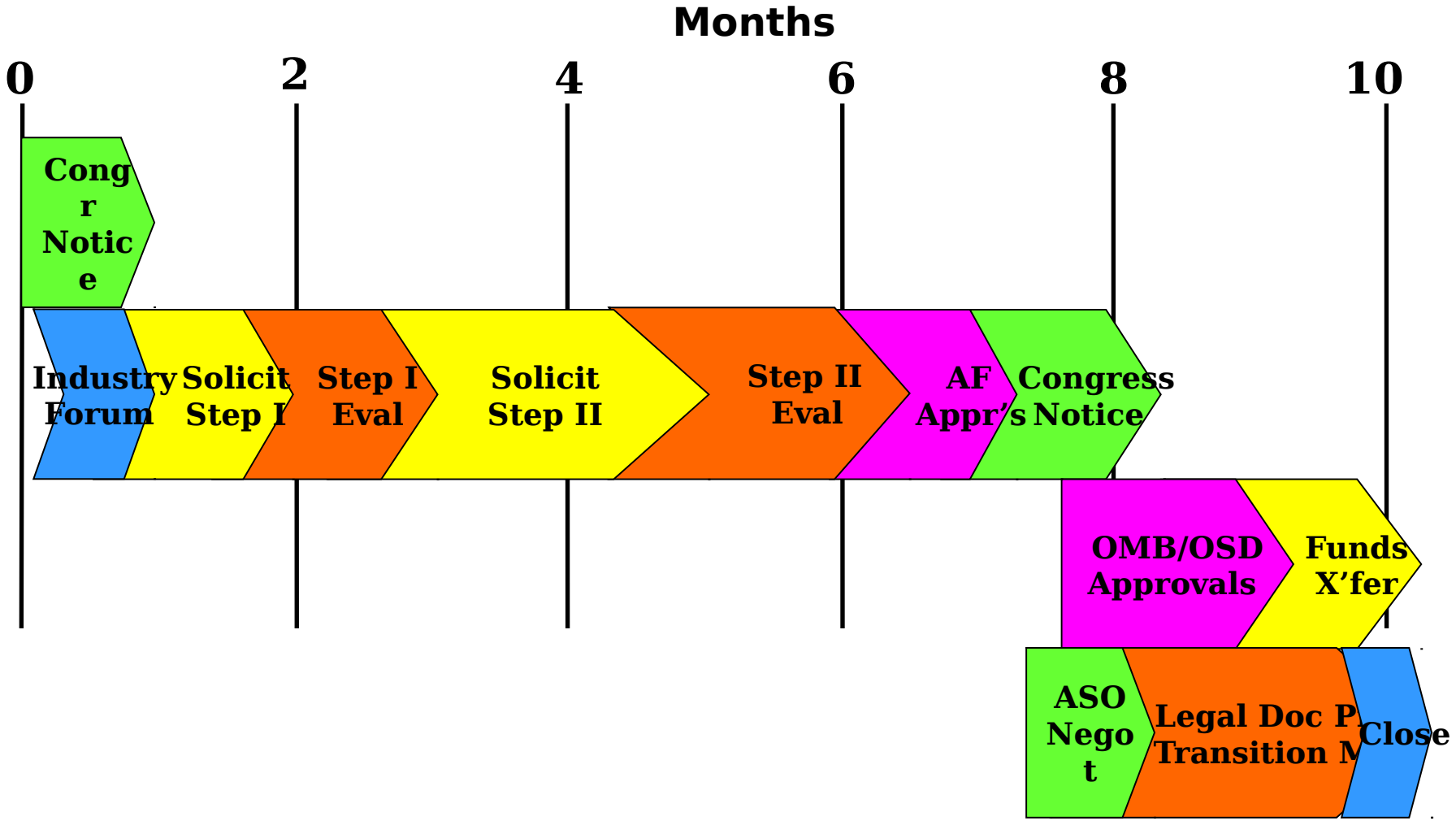


Project Identification	Project Development	Project Acquisition	Portfolio/Asset Management	Project Closeout
Description	**Description**	**Description**	**Description**	**Description**
Initial Concept Development	Define Project Requirements	Project Solicitation and Evaluation	Oversight of Privatized Housing	End of Privatization deal
Activities	**Activities**	**Activities**	**Activities**	**Activities**
Family Housing Master Plan	Concept Development	Industry Forum	Construction Oversight	Disposition of Assets
Pre-Sight Orientation	Environmental Analysis	Evaluate and Select Developer	Financial Planning	
	RFP Development	Close Deal	Budgeting	
		Transition Assets	Management Review Committee	

U.S. AIR FORCE

Project Life Cycle

Phase III Project Acquisition



U.S. AIR FORCE

Project Life Cycle

Project Schedule

ID	*	OPR	Name	Duration	Start	Finish	Predecessors
19		AFCEE.PSC	Post Notice in FedBizOpps (http://www.fedbizopps.gov/)	1 day	Tue 10/14/03	Tue 10/14/03	
20	*	PSC	Post RFP on PSC Web Site	1 day	Tue 10/14/03	Tue 10/14/03	
21		PSC	Train PSC Assessment Team	1 day	Tue 10/14/03	Tue 10/14/03	
22	311	HSW/PKOA	Train Acquisition Support Team	1 day	Wed 10/15/03	Wed 10/15/03	21
23	*	PSC	Receive Pre-Qualification Proposals	30 edays	Tue 10/14/03	Thu 11/13/03	19
24		**PSC**	**Step One - Pre-Qualify Offerors**	**33 days**	**Fri 11/14/03**	**Fri 1/2/04**	**23**
25		PSC	Assess Pre-Qualification Proposals	20 days	Fri 11/14/03	Fri 12/12/03	23
26		PSC	Brief AST on Results of Assessment at AFCEE	5 days	Mon 12/15/03	Fri 12/19/03	25
27		AST, PSC	Document Base Approval	2 days	Mon 12/22/03	Tue 12/23/03	26
28		AST	Set up MAJCOM/CV Briefing with ESG	0 days	Tue 12/23/03	Tue 12/23/03	27
29		AST	Provide Docs to MAJCOM/CV and ESG for Read-Ahead	0 days	Tue 12/23/03	Tue 12/23/03	27
30		AST	Brief MAJCOM/CV with ESG	1 day	Fri 1/2/04	Fri 1/2/04	28FS+5 days
31	*	AST	Document MAJCOM/CV and ESG Approval of Step One Results	0 days	Fri 1/2/04	Fri 1/2/04	30
32		PSC	Inform Offerors Outside Competitive Field	0 days	Fri 1/2/04	Fri 1/2/04	31
33		**PSC**	**Solicit Step Two Proposals**	**43 days**	**Mon 1/5/04**	**Fri 3/5/04**	**24**
34	*	PSC	Request Step II Proposals from Pre-Qualified Offerors	1 day	Mon 1/5/04	Mon 1/5/04	
35		PSC	Offerors Prepare Step II Proposals	60 edays	Mon 1/5/04	Fri 3/5/04	34
36		**PSC**	**Step Two - Evaluate Offerors**	**33 days**	**Mon 3/8/04**	**Wed 4/21/04**	**24**
37	*	PSC	Receive and Assess Step II Proposals	5 days	Mon 3/8/04	Fri 3/12/04	33
38		PSC	Conduct/Document Discussions w/ Offerors & AST Members	5 days	Mon 3/15/04	Fri 3/19/04	37
39		**Offerors**	**EN Response/Proposal Revisions**	10 days	Mon 3/22/04	Fri 4/2/04	38
40		PSC	Prepare "Proposal Assessment Results Report"	8 days	Mon 4/5/04	Wed 4/14/04	39
41							40
42							41
43							42
44							**36**
59	*	AF					58
60							58
61							59
62							59
63							**60**
64		A					60
65		AF					60
CN, AFCEE/JA,							60
67							66
68	*	S					67,60
69		A					
70							68
71		AF					60

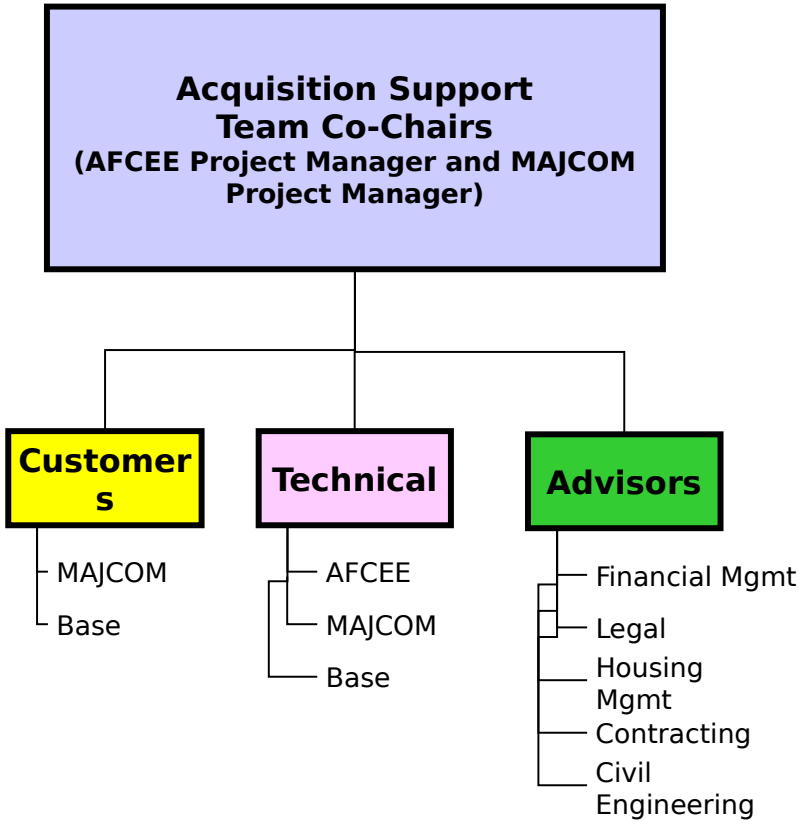
Lessons Learned:

- Be flexible
- Developers need the full time allotted
- Don’t compromise evaluation time
- Don’t overlook ancillary tasks
- Share good approaches
- Get on leadership’s schedule early

U.S. AIR FORCE

Composition of the AST

- **AST is ideally composed of key members of the Project Development Team (PDT)**
  - **Civil Engineering**
  - **Contracting**
  - **Legal**
  - **Finance**
- **Advantages**
  - **Very familiar with RFP and project concept**
  - **Intimately involved in the resolution of base issues (e.g., environmental, utilities, school districts, etc.)**



Note: The PSC serves as a <u>consultant</u> to the AST

U.S. AIR FORCE

Composition of the AST (cont.)

- Consists of voting and advisory members
  - AST voting members should consist of at least 50 percent of MAJCOM and base personnel
  - Co-chaired by AFCEE PM and MAJCOM PM
- Key members of the AST should have selection experience, if possible

U.S. AIR FORCE

AST Appointment

- **The AST co-chairs provide letters of appointment to AST members**
- **Personnel assigned to the AST shall consider this duty as their primary responsibility**
  - **AST assignment takes precedence over all other work assignments**
  - **Supervisors are responsible for ensuring that other work assignments do not conflict with subordinates' AST duties**

U.S. AIR FORCE

AST Training

- **AST members will receive selection training prior to RFP Issuance in Phase III**
- **AFCEE CO or designee will conduct the AST selection training**
- **Training emphasizes:**
  - **The need to safeguard proposal documents or information**
  - **That only appointed AST members can review or access proposal documents**
  - **In-depth explanation of RFP evaluation process to include color definitions and performance confidence assessment ratings**

U.S. AIR FORCE

AST Roles and Responsibilities

- **AST performs all <u>inherently governmental</u> functions during Project Acquisition and ensures that:**
  - **PSC-recommended solicitation evaluation documents are acceptable**
  - **Any issues which arise during Project Acquisition are appropriately resolved**
  - **Adherence to the RFP for soliciting and assessing development proposals**
  - **All selection documentation is adequately and properly prepared to brief and obtain MAJCOM/CV approval**

U.S. AIR FORCE

AST Co-Chair Roles and Responsibilities

- **Primary duties are to:**
  - **Serve as the Selection Authority's quality control for all selection documentation**
  - **Serve as the primary administrator for the selection process**
  - **Ensure adequate resources are available to perform the task at hand**
  - **Sign the AST appointment letters**
  - **Ensure SS briefing certificates are signed by all AST members**

Selection Authority (SA) Responsibilities

- **SA has overall responsibility to direct the selection process:**
  - **Ensures there is no unauthorized disclosure of selection information**
  - **Determines if award without discussions is appropriate**
  - **Makes selection decision**

U.S. AIR FORCE

Key Decisions Made by the AST

During Step One the AST validates the PSC assessment results, rates each subfactor, and recommends the down select for MAJCOM/CV approval.

During Step Two the AST validates the PSC assessment results, rates each subfactor, and makes a final recommendation for MAJCOM/CV approval

U.S. AIR FORCE

AST Activities and Meeting Locations

- **PSC sends a copy of each proposal (Steps One and Two) to the base, MAJCOM, and AFCEE**
  - **Project Manager at each location ensures proposals are safeguarded and available only to appointed AST members**
  - **AST members at each location review proposals and prepare questions or clarifications if necessary**

U.S. AIR FORCE

AST Activities and Meeting Locations (cont'd)

- **Key AST members may be required to attend meetings at the PSC's office during the solicitation evaluation process**
- **Ensure evaluation process is being accomplished per the RFP**
- **Validate PSC proposal assessment**

U.S. AIR FORCE

AST Activities and Meeting Locations

- **At the conclusion of each evaluation step, all AST members meet at a location that is most convenient**
  - **Validate the PSC's proposal assessment**
  - **Reach agreement for a recommendation to the MAJCOM/CV**
  - **Review/approve PSC-developed MAJCOM/CV recommendation briefings**

U.S. AIR FORCE

Lessons Learned

- At a minimum, expertise in financial, contracting, legal, and engineering is required to diversify the team and effectively evaluate proposals
- Members must be empowered to make decisions
- AFCEE will augment the AST with any necessary members not identified from base or MAJCOM resources
- Continuity from PDT to AST is essential to building a successful project
- Installation commander support is vital
- Base Housing office must be strongly involved throughout
- AST members should be trained in AF source selection procedures and the PSC's role in the process

U.S. AIR FORCE

Two-Step Solicitation Process - Overview

- The AFCEE Generic RFP provides a two-step solicitation process
- Process allows:
  - All Offerors to respond to Step One in a timely and cost–effective manner
  - The Government down-selects Step One offerors expeditiously
  - Offerors most qualified from Step One, proceed to Step Two

Two-Step Solicitation Process - Step One

Step One consists of two volumes:

Volume 1: Qualifications

- **Factor 1 – Business Arrangements**
- **Factor 2 – Financial**
- **Factor 3 – Project Concept**

Volume 2: Past Performance

- **Factor 4 – Past Performance**

- The goal of this step is to downselect without discussions
- Offerors failing any of the evaluation factors are not allowed to continue in the process

U.S. AIR FORCE

Assessment and Selection Process - Step One

- **PSC Evaluates Step One Proposals and provides recommendations to the AST**
- **The AST will meet to review, discuss and rate the Step One proposals.**
- **AST briefs the Wing CC, ESG and Selection Authority (MAJCOM/CV) on assessment and obtains down select approval prior to initiating Step Two**
  - **All successful and unsuccessful offerors are notified by the PSC**
  - **Any requested debriefings to unsuccessful offerors conducted by Government CO**
  - **Offerors found to be the most highly qualified in Step One will be invited to submit detailed technical and business proposals under Step Two**

Two-Step Solicitation Process - Step Two

Step Two consists of three volumes:

- **Volume 3: Financial**
  - **Factor 1 – Financial**
- **Volume 4: Design and Construction**
  - **Factor 2 – Design and Construction**
- **Volume 5: Property Management**
  - **Factor 3 – Property Management**

2

The goal of this step is to select the offeror that provided the best value to the project, and make a final recommendation for MAJCOM/CV approval

U.S. AIR FORCE

Evaluation
Step II

- PSC performs administrative check of submissions
- PSC performs preliminary proposal assessment
- PSC prepares EN's
- AST issues EN's
- PSC hosts discussions if necessary
- PSC receives proposal revisions
- PSC prepares evaluation worksheets

Assessment and Selection Process- Step Two

- **PSC will brief the AST on the results of their Step Two assessment and recommendation**
- **AST will meet to review and rate the Step Two proposals and assess which offer provides the best value for the Air Force**
  - **The AST co-chairs will arrange for a selection briefings to the Wing CC, ESG and Selection Authority (MAJCOM/CV)**
    - **Process may involve pre-briefs to MAJCOM and ILEH staff**
  - **The MAJCOM/CV will make the selection**
- **ILEH briefs the results of the evaluation and selection to OSD for concurrence /approval**

U.S. AIR FORCE

Evaluation
Lessons Learned

- Update offerors on any new data
- Respond to Q&A quickly
- Offeror proposal preparation and due diligence varies
- Proposal must meet all minimum requirements
- Tie EN's directly back to RFP
- Grant offerors equal revision opportunities
- Don't perform premature evaluation
- Maintain evaluation discipline
- Have offerors on stand-by during evaluation period
- Control documentation and evaluation worksheets
- Proposed legal modifications should only be true deal-killers
- Successful proposal becomes part of closing documents
- Operation & management plans are critical
- Maintain source sensitive integrity at all times

U.S. AIR FORCE

Approvals

- Wing Commander
- Senior Advisory Committee
- ESG reviews assessment
- Selection Authority
- OSD
- OMB
- Congressional Committees

Lessons Learned:

- Get on senior leaders' calendars early
- ESG sharpens the recommendation documentation
- Begin financial package immediately
- Use current briefing templates
- Prepare for OSD/OMB questions

U.S. AIR FORCE

Countdown

- Notify ASO conditionally
- Begin negotiations immediately
- Transition meeting
- Debrief non-successful offerors
- Pre-closing meetings
  - Legal
  - Business
- Close

Questions ?